DOCUMENT RESUME

ED 154 722 HE 010 021

TITLE	Silver Lake College Planning Procedures Manual.
INSTITUTION	Silver Lake Coll., Manitowoc, Wisc.
SPONS AGENCY	Department of Health, Education, and Welfare, Washington, D.C.
PUB DATE	Nov 77
NOTE	93p.
AVAILABLE FROM	Campus Core Committee for Planning, Silver Lake College, Manitowoc, Wisconsin 54220
EDRS PRICE	MF-$0.83 HC-$4.67 Plus Postage.
DESCRIPTORS	Administrator Guides; Check Lists; *College Administration; *College Planning; *Educational Objectives; Higher Education; *Private Colleges; *Systems Approach

ABSTRACT

Outlined in detail are the goals of this private college in establishing a formal planning process, and its achievements and future efforts in attaining them. The manual is a checklist of procedures and is based in principle on "An Approach for Improved Planning in Colleges" by Roger G. Schroeder. (MSE)

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PLANNING PROCEDURES MANUAL

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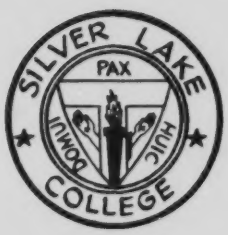

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SILVER LAKE COLLEGE

Manitowoc, Wisconsin

HE 010 021

SILVER LAKE COLLEGE

PLANNING PROCEDURES MANUAL

A Publication of the Campus Core Committee for Planning

November 1977

Preface

A number of people have assisted in preparing this manual and deserve recognition for the time and thought which they have devoted to it. The members of the Campus Core Committee for Planning, Sister Anne Kennedy, Sister Martina Van Ryzin, Sister Jolyce Buttres, Sister Martin Flavin, and Sister Julia Van Denack began in February 1977, the work which culminated in this publication. Cliff Garrison, Tom Englund, and Greg Markovich of the Small College Consortium staff have provided much advice and support. The intellectual debt owed Roger Schroeder of the University of Minnesota, Minneapolis-St. Paul, and William Shoemaker and Dan Pilon of the Council for the Advancement of Small Colleges is immense. I have borrowed freely from them. In addition Messrs. Schroeder, Markovich, and Joseph Kauffman of the University of Wisconsin, Madison, read an early draft of the manual and provided incisive criticisms. Ray Ahl of the Social Science Department at Silver Lake also made a number of pertinent comments which resulted in substantial improvements. Tom Benson, the Small College Consortium On-Campus Coordinator at Lakeland College, Sheboygan, Wisconsin, has served as a sounding board for many of my ideas. Mrs. Sharon Becker and Mrs. Judith Heinzen of Silver Lake College have typed clear copy from my sometimes illegible scrawl.

The assistance of all these people has produced a much stronger "Planning Procedures Manual." Needless to say, the responsibilities for the errors that remain are mine alone.

The activity which is the subject of this report was supported in part by the U.S. Office of Education, Department of Health, Education, and Welfare. However, the opinions expressed herein do not necessarily reflect the position

or policy of the U.S. Office of Education, and no official endorsement by the U.S. Office of Education should be inferred.

Edgar F. Raines, jr.
Manitowoc, Wisconsin

November 23, 1977

TABLE OF CONTENTS

	Page
Preface	iii
Table of Contents	v
List of Figures	vi
I. Introduction: A Rationale	1
II. Track I: A Definition of the Planning Process	6
III. Track II: Writing Plans	31
IV. Track III: Planning Information	50
V. Conclusion: Some Observations on Implementation	56
Appendix I A Glossary of Acroynms and Planning Terms	58
Appendix II The Four Year Small College Consortium Campus Growth Plan	62
Bibliography	67

LIST OF FIGURES

	Page
I. The Schroeder Approach to Planning	5
II. Annual Planning Cycle Silver Lake College	7
III. Abbreviated Planning Calendar	29
IV. Planning Information	52
V. A Calendar for Planning Information	55
VI. Small College Consortium Four Year Plan	66

I. Introduction: A Rationale

Although the concept of planning is often obscured by technical verbiage, the idea is simple and straight forward. Planning consists of determining what you need, deciding how and when to fulfill those needs, and--after doing what you intended--evaluating the results. We all plan in both our professional and personal lives, whether it is a simple procedure such as listing on the back of a used envelope all the activities we need to perform on a given day and selecting the most appropriate sequence for doing them or the somewhat more elavorate exercise of choosing what to do (and what not to do) so that the checking account shows a slight surplus at the end of the month.

In an institutional context planning is often coupled with the word process. "Planning process" indicates some sort of regularized procedure involving several steps. A planning process repeated at regular intervals is called a planning cycle.

While the operational definitions of planning process and planning cycle are straight forward, the phrases possess a methaporic quality which distorts expectations if not meanings. "Process" and "cycle" suggest a living organism, which implies that planning is a natural response to organizational development as opposed to the mental image the term bureaucracy produces, lifeless ciphers working within the confines of a set of narrow, perhaps irrational, rules oblivious to conditions in the larger society of which they are members. Planning process thus connotes an open-ended procedure, adapting to conditions both inside and outside the organization and leading to personal growth for the people who engage in it--growth in their understanding of insti-

tutional capabilities and needs and growth in their ability to strengthen those capabilities and satisfy those needs. These are very desirable conditions, but they are not attained quite as effortlessly as the somewhat utopian imagry of the planners would suggest. Failure to recognize the chimerical quality of this hidden appeal can produce premature disillusionment with the realities of planning.

While the realization of all the idealistic expectations suggested by the terminology of planning is not possible, the procedure does promise tangible benefits. The goals of Silver Lake College in engaging in a formal planning process are:

1. To enhance the ability of the college to survive by allowing administrators to make decisions in the light of the best obtainable knowledge of future prospects;
2. To buttress the essentially democratic system of governance by allowing for maximum feasible input into the development of plans;
3. To develop a consensus about institution-wide goals and mission and to translate them into measurable objectives;
4. To minimize the possibility of overlap, duplication of function, and working at cross purposes in the administration of the institution.

The school's immediate objectives in planning are:

1. To establish by February 1977, an administrative committee to provide guidance in the planning process;
2. To select by March 1977, a planning process best suited for the attainment of college goals and adapt it to local conditions by

August 1977;

3. To test the planning process during the 1977-78 academic year in selected departments and offices;
4. To revise the planning process in the light of experience and expand its operations to include all departments and offices during the 1978-79 academic year.

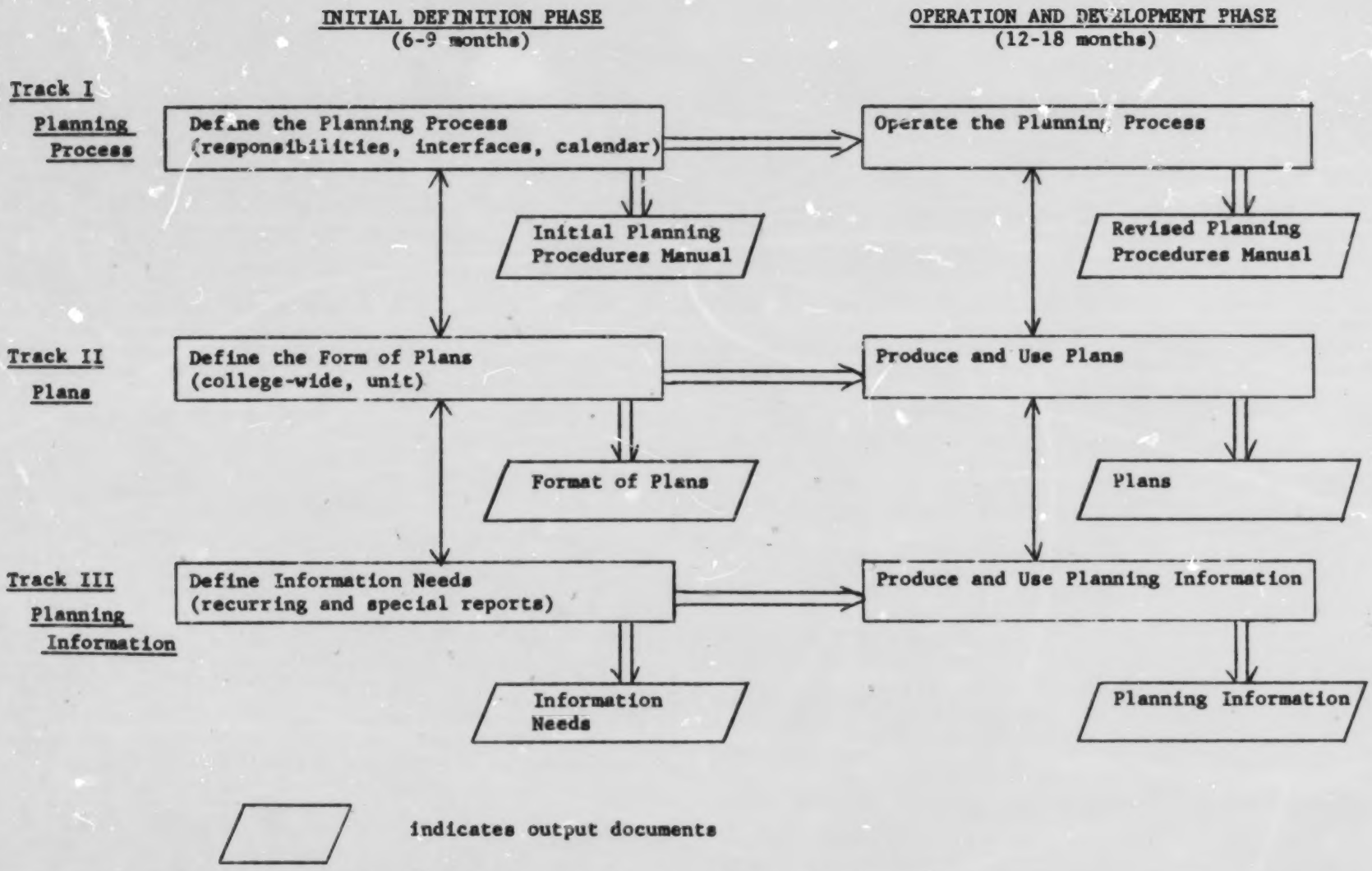
This manual reports upon how the school achieved the first two objectives, and, hopefully, it represents a clear, concise description of how the college intends to attain the third and fourth ones. The manual traces the planning process in some detail. The detail is important. The premise is that a formal description in writing provides greater freedom for informality in practice. People think best -- and planning is nothing more than thinking about the future -- in a relaxed, non-threatening atmosphere. The manual is simply a checklist; it allows people to plan together on their coffee breaks or over lunch without the persistent fear of forgetting an important step in the procedure.

The general approach to planning adopted by Silver Lake is one developed by Professor Roger G. Schroeder of the University of Minnesota (see the article "An Approach for Improved Planning in Colleges" by Professor Schroeder). The organization of the manual reflects this approach. The next section deals with what he calls Track I, a definition of the planning process including a specification of the functions of the planning bodies and the staff support required, a clarification of their relation to existing organizations, and an explanation of the planning calendar. The third section of the manual corresponds to his Track II, the actual steps by which the plans are written, both by the college as a whole and by its

individual departments and offices. The fourth section, his Track III, consists of a delineation of the kinds of information needed for planning and the frequency of reporting required. Figura I illustrates his concept. The final section of the manual addresses the question of implementation.

Figure I

The Schroeder Approach to Planning*



*Roger G. Schroeder, "An Approach for Improved Planning in Colleges" (Paper presented at the Institute of Management Sciences and Operations Research Society of America, Chicago, Illinois, April 30-May 2, 1975)

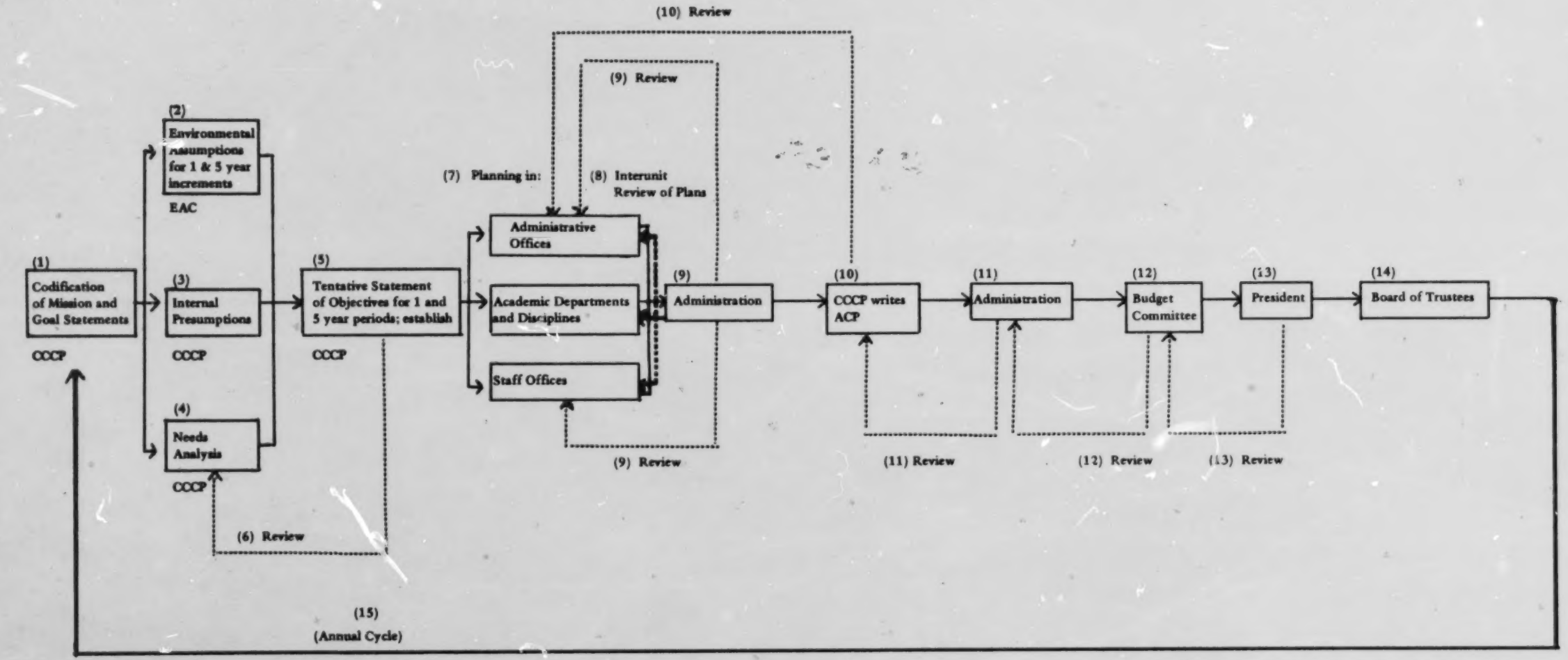
II. Track I: A Definition of the Planning Process.

A. The Planning Process at Silver Lake College.

The planning process which the college intends to field test during the 1977-78 academic year is essentially a fifteen step process. (See Figure II.)

1. Faculty and administrators develop a consensus about the college's mission and goals. Mission in this context refers to the broadest possible statement of institutional purpose. It is timeless and unchanging and often represents an ideal condition, a guide for action rather than an attainable reality. Goals are statements of how the institution intends to fulfill its mission. They are more specific than a mission statement but they still retain a sizable ideal content. The Campus Core Committee for Planning (CCCP) is charged with the responsibility for ensuring that the consensus develops and is recorded.
2. The next step is to determine what factors external to the college might influence the ability of the school to achieve its objectives. The extraneous factors selected are called environmental assumptions. The responsibility for this stage rests with the CCCP, but an ad hoc committee, the Environmental Assumptions Committee (EAC), reporting to the CCCP, will actually collect the information and write the assumptions.
3. The CCCP lists any internal presumptions which the units engaged in planning will accept as givens. The presumptions

FIGURE II
Annual Planning Cycle
SILVER LAKE COLLEGE



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are broad statements of intent about which consensus already exists on campus. The committee might, for example, presume that the college will not become a vocational-technical school during the period which the plan will cover.

4. Simultaneously the CCCP analyzes the strengths and weaknesses of the college and prepares a document, entitled "Needs Analysis," listing them.

5. After the campus community agrees about the mission and goals it is necessary to further refine what the college intends to accomplish by writing objectives. An objective is a clear, concise, specific statement of an anticipated outcome expressed, when possible, in quantifiable terms. It represents the results by which the college expects to express the ideals contained in the mission and goal statements. Once again the CCCP is responsible for this stage. It writes the initial draft of the objectives, prioritizes them, and makes any necessary revisions. It is also responsible for soliciting faculty, administrator, and student reactions. Once again the objectives and the priorities should reflect a campus consensus. Everyone may not agree completely about every detail at the end of this stage, but everyone should understand the reasons why one objective ranked higher than another in the final draft. The information upon which this reasoning was based should be available to all.

6. The fifth stage is a review of collegiate objectives in the light of the environmental assumptions and needs analysis. External trends may make some objectives unattainable. For example, an

objective mandating a sizable increase in the student body at a time when the number of college age men and women is declining precipitously probably requires reexamination. Other objectives might appear too modest.

7. Following the review, the various administrative offices, academic departments and disciplines, and staff offices develop their plans, referred to as unit plans, in the light of the institution objectives and the environmental assumptions. Some preliminary activities at the unit level--e.g. the writing of unit mission and goal statements, the preparation of unit environmental assumptions, and the formulation of unit needs analyses--can precede the completion of the fifth stage, but the unit should retain sufficient flexibility to modify, if necessary, some of its conclusions after the publication of the collegiate environmental assumptions, needs analysis, and prioritized objectives.
8. After the initial unit plans are developed, they are exchanged so that each unit of the college can see what the other units are planning and revise their own plans accordingly.
9. The revised plans then go to the chief administrative officers of the college for review and comment. In this stage the administrative officers act more as counselors than as decision makers. They return the plans to the units for further revision. The units consider any proposed revisions and make any changes they consider necessary. Once a consensus exists between the units and the administrators (at this stage an infinite number of reviews is theoretically possible,) the units forward their plans to the CCCP.

10. The CCCP writes the all-college plan based upon the unit plans forwarded to it. If discrepancy exists between the plans of different units -- e.g., the admissions office anticipates a ten per cent increase in the number of students while the cafeteria believes that the number may decline by five per cent and calculates income and expenditures accordingly -- the CCCP will contact the people concerned and try to resolve the problem informally. If informal discussions fail to settle the question, either the committee or the unit involved may refer it for final decision to the President, the chief planning officer of the college. To an extent the all-campus plan is simply a compilation of the unit plans. However, some problems may cut across units, others may not fit into any of the existing units. In such instances the CCCP is directly responsible for planning in areas until an office or department is created to deal specifically with those problems.

11. The appropriate administrative officers approve or reject the plans of units which report to them. For example, the Academic Dean approves the plans of the academic departments, the Admissions Office, the Library, the Registrar, the Assistant Academic Dean's Office, the Instructional Television Center, etc.

12. The administrative officers present the plans of their own offices and the units which report to them to the Budget Committee. The Budget Committee may accept, reject, or request revisions in the plan.

13. The Budget Committee forwards the budget for the next fiscal year and the all-college plan to the President. She may accept, reject,

modify, or request revisions in one or both.

14. The President forwards the plan to the Trustees.

15. The process is repeated during the next academic year.

Although this discussion of the planning cycle has specified a review at only a few points, the actual implementation will require a continuous process of informal review and updating. This description identified only those points at which formal reviews occur.

B. The Planning Bodies at Silver Lake College.

The administration has created two separate bodies and charged them with a responsibility for activities related to the planning process -- the Campus Core Committee for Planning and the ad hoc Environmental Assumptions Committee (EAC). They are not the only "planning bodies" on campus, because the method of planning adopted by the school ensures that every organizational unit generating a budget -- departments, disciplines, and administrative or staff offices, -- will participate in some fashion and thus constitute "planning bodies." Only the two committees named above, however, devote such a large amount of their time solely to the planning process. This section describes the mission and goals of the committees, delineates their accountability, and describes their relationship to the total college community. It also briefly describes the role of the "other" planning bodies -- i.e. the remainder of the college -- in the planning process. Faculty, administrative, and ad hoc committees do not generate budgets and thus do not participate in the formalized planning process, but what the committees do often involves planning. The section on "other planning bodies" also considers their activities and their relationship to the formal process.

The Campus Core Committee for Planning

The Campus Core Committee for Planning is an administrative committee created by the President. As such it possesses all the powers and limitations of other administrative committees. It advises the President about policy but does not initiate or administer it. Its members are appointed by the President and serve at her pleasure. The committee, while continuous in the sense that it exists until discontinued by the President, has no life unless she agrees to it.

The Campus Core Committee was organized in October 1976, as a part of the college's participation in the Institutional Development Project of the Small College Consortium. The committee held its first meeting on November 5, 1976. During February 1977, the President redefined the scope of the committee to include responsibility for long-range planning and changed its name to reflect its new duties.

The Mission and Goals of the CCCP

The mission of the Campus Core Committee for Planning is to advise the President about the college's participation in the Institutional Development Project of the Small College Consortium and to coordinate the development of both long- and short-range plans to assist the President and other line officers in the administration of their responsibilities.

The goals of the committee are:

1. To make an in-depth study of the entire Small College Consortium Project:
   a. Planning, Management Information Systems, Fiscal Resources Management;

b. Enrollment, Development, Retention, Financial Aid;

c. Program Development;

d. Personnel Management and Development.

2. To make an in-depth study of each specific area and to oversee the planning of activities related to each area and the evaluation of these activities in light of how they relate to:

a. The mission of the College;

b. The goals and objectives of the College;

c. The solution of the problems of the College.

3. To assist the On-Campus Coordinator in coordinating activities in the five areas under study.

4. To assist the On-Campus Coordinator in recommending policies and implementing approved policies relative to the Small College Consortium Project.

As of August 1, 1977, the membership of the committee consisted of the President, the Academic Dean, the Director of Student Personnel Services, the Chairperson of the Humanities Department, the Chairperson of the Department of Natural Sciences and Mathematics, and the Assistant Academic Dean (the On-Campus Coordinator).

The Relation of the CCCP to the College Community

The Campus Core Committee for Planning is directly responsible and accountable to the President.

The Campus Core Committee for Planning functions as an advisory and participatory arm of the administration, as do other administrative committees. As such, it relates to other campus groups as follows:

1. By communicating regularly with them;

2. By collaborating, if necessary, with other committees, staffs, officers, etc.

The interaction between the CCCP and the remainder of the campus occurs in two different contexts, the internal functioning of the committee and the external nexuses between it and other units.

All the members of the committee participate in some aspect of campus life and, because of these institutional backgrounds, may be said to represent them within the committee discussions. Yet this "representation" is of a peculiarly narrow kind, not at all equivalent to the definition of representation common to American politics, i.e. speaking and acting by duly conferred authority for constituents. Rather within this committee and, in fact, within all committees the members represent a sector of college life in two senses. First, they possess an intimate knowledge of the problems peculiar to their sectors. Second, they can speak about the practical effects of any proposal upon that part of the college with which they are most acquainted. Ideally a committee's deliberations should be a discussion among equals -- a dialogue.

Cliff Garrison, who served as the Small College Consortium Advisor to Silver Lake College during the 1976-1977 academic year liked to make this distinction by saying that the difference between a successful committee and a less successful one was the difference between "collaboration" and "cooperation." Collaboration, he said, means "you, me, us," and he would hold his arms out in front of himself in a circle. Cooperation, on the other hand, means "them or us," and he would double up his fists and rub them against one another. To him collaboration suggested working together in unity to achieve a common goal. Collaboration did not require the absence of differences in

opinion; in fact it necessitated the honest discussion of those differences. It implied, however, that the members placed the achievement of commonly held goals above all other considerations. On the other hand, cooperation meant working together as representatives of different interest groups. In this situation the goals and objectives of whatever constituency the committee members represented took precedence over any commonly held goals within the committee.

For the CCCP then, the discussion of policy in committee involves:

Persons who come from separate operations

Collaborating

Equally

In Committee.

A good committee discussion is a seminar without a seminar leader.

The collaborationist concept of a committee appears to solve that Toquevillean conundrum, the opposition between liberty and democracy. On the one hand the concept provides equality among the members -- no member because of his or her position within the administrative hierarchy may veto the ideas of any other member in the committee discussions -- while on the other hand, it provides for freedom of expression and makes intellectual merit the sole criteria for judging a proposal. Yet, the collaborationist concept poses as many problems as it solves. Everyone knows that the legal responsibilities of the President are much greater than, for example, the Assistant Academic Dean, yet the collaborationist concept judges them equal. How can this fiction survive in practice? How binding are the reports of the CCCP upon the actions of the President (or for that matter any other line officer)? The answers to these questions require a thorough examination

of the relationship of the President to the planning committee.

The Relation of the President to the CCCP

The President has an administrative role peculiar to her position in the institution. The power and authority of decision are lodged in that position. It must not appear either to other committee members or to the faculty at large that the planning committee is pre-empting the powers of the President. Within the committee the President represents a certain administrative role which has unique functions and responsibilities. The President must speak candidly about the effects of any plan on those functions and responsibilities. A particular proposal might make her task more difficult; it might antagonize people with whom the President must work closely.

The committee might overrule the President in a discussion, because it is a discussion among equals. Once the President steps outside the committee room door, however, she is again the chief administrative officer of the college. She can and may veto a plan of which she does not approve or send it back to the committee.

If the long-range planning process is to deserve the support of the faculty, the committee must never overshadow the President. It is, crucial, therefore, that both the committee members and the faculty clearly understand the relation of the President to the CCCP.

The Relation of the CCCP to Other Campus Units

Once again the idea of collaboration is a very necessary one. If planning is to succeed it must have the support of the faculty, the administration, the students, and the staff. To merit this support, the planning cycle must be designed so as to avoid making the all-campus planning committee

into a "super" committee which somehow is "over" other committees. In its work on a planning cycle for Silver Lake College, the CCCP very carefully attempted to avoid not only the reality but also the appearance of such hegemony.

Basically the committee sought to ensure that the planning process fit into the already existing constitutional relationships on campus. Therefore, the committee structured the planning cycle to severely restrict the authority of the CCCP.

1. Aside from the ad hoc Environmental Assumptions Committee, which is a subcommittee of the CCCP, no office, department, or committee reports to the CCCP. The CCCP receives recommendations and unit plans from departments and offices, but solely in its capacity as the coordinating agency in the planning cycle.
2. The role of coordinating agency means that the CCCP makes certain that the appropriate functions, e.g. the collection and publication of environmental assumptions, the drafting of initial plans, etc., are performed at the appropriate level at the appropriate time.
3. The CCCP is simply an administrative committee; it possesses no inherent authority and exists only at the pleasure of the President.
4. The CCCP, because of both the composition of the committee and the nature of its mandate, must consider the perspectives of all areas of campus life. It may not necessarily adopt the perspective of one particular sector, but it must give all sectors a fair hearing. If planning is to succeed, the campus community must perceive of the committee as fair minded.
5. The activities and recommendations of the CCCP are open to public

scrutiny.

Opening the activities and recommendations of the CCCP to public scrutiny is one of the major methods of demonstrating to the campus community that the committee is fair minded and is not prejudiced for or against anyone. The techniques through which the CCCP can demonstrate its integrity are varied. Its meetings, like those of all other committees on campus, are open to the public and are announced to the campus in the appropriate fashion. Through its oversight of the ad hoc Environmental Assumptions Committee it ensures that the external environment assumptions which will affect the unit and college-wide plans are thoroughly discussed by the faculty, administration and students before they are formally adopted as criteria in the planning process. The CCCP also ensures full discussion of and faculty participation in the writing of objectives and their prioritization. If the committee finds it necessary to alter any previously established priorities or introduce new or modify old objectives, it must hold open hearings on the question. The committee must announce the hearings at least one week in advance. The announcement must include both the old statement of prioritized objectives and the new statement with a detailed explanation of the reasons for the proposed changes. In both the initial preparation of a statement of prioritized objectives and in any revisions the responsibility for their approval rests with the President. The committee makes monthly reports to the faculty about the environmental assumptions, the objectives, and the progress of the planning effort prior to the drafting of the college-wide plan. Finally, prior to the submission of the plan to the Budget Committee, the CCCP must hold open hearings upon the plan under the same ground rules which govern the open hearings on the statement of prioritized objectives.

The CCCP thus has the duty of coordinating the planning process and ensuring the opportunity of people from all sectors of the campus to participate in formulating the guidelines under which that process will operate. More than simply a concern about information flow is involved. Hopefully, the procedure will allow people to "buy into" the activities of the all-campus planning committee. Without some sense of shared experience planning will serve the needs of only a narrow clientele and provide only marginal benefits to the institution.

The Environmental Assumptions Committee: Mission, Goals, and Procedures

The Environmental Assumptions Committee (EAC) is an ad hoc committee which acts as a subcommittee of the Campus Core Committee for Planning. It is chaired by a member of the CCCP but its other members are drawn from the college at large. The EAC functions under guidelines devised by the CCCP. The mission of the EAC is to collect information about conditions off campus, both current and anticipated, which may influence the implementation of any long- or short-range plan developed on campus.

The goals of the EAC are as follows:

1. To determine what kinds of off-campus factors might influence campus plans;
2. To contact agencies which possess accurate information about these factors and to assemble the information;
3. To write the environmental assumptions and to allow all sectors of the campus community to examine and comment upon them and their supporting information;
4. To report their assumptions to the CCCP at the appropriate time in the planning cycle;

5. To continue to monitor environmental conditions during the remainder of the academic year and report any necessary modification of the environmental conditions to the CCCP.

The procedures devised by the CCCP whereby the EAC will attempt to accomplish those goals in effect define more precisely the relationship of the EAC to the CCCP and to the rest of the college. Essentially the member of the CCCP designated chairman of the EAC will organize the committee early in the academic year. After the committee has decided what factors need study and has collected information about them, it will prepare a preliminary draft of the environmental assumptions for which it will provide a forum for faculty reaction. After modifying the assumptions as it thinks necessary, the EAC will submit the corrected draft of the environmental assumptions to the CCCP. The CCCP may accept, reject, or request modifications of the EAC's report. The period between the formation of the EAC and the submission of a report to the CCCP should be approximately one month. Thereafter, the EAC meets only occasionally to determine if it should modify the environmental assumptions. It should hold an open hearing if it contemplates a major modification.

The "Other" Planning Bodies

The relationship between any college office, department or discipline and planning is fairly straight forward. All of these units generate a budget, and the connection between a workable plan and money is obvious. Of course, some departments do not possess autonomous disciplines, and the internal production of a unit plan will vary between them. In the former all activity will center on the departmental level, most probably in departmental meetings. In the latter the disciplines will generate the plans, with the departmental chairperson responsible for collating the discipline plans, coordinating the

preparation of plans for interdisciplinary offerings, and department-wide activities. The departmental plan will simply constitute a compilation of all these plans.

Not everyone, may discern immediately the relation between committees, which do not generate budgets, and planning. Perhaps the link will become clearer if the functions of the various kinds of committees on campus are analyzed.

Standing Committees of the Faculty

The standing committees of the faculty are involved in the formulation of policy. Policy deliberation contains at least five components:

1. Defining the mission and goals;
2. Determining needs and objectives;
3. Providing for the collection of data;
4. Providing for a decision about what activities are possible;
5. Estimating the probable cost.

This perhaps overly didactic summary of the committee discussion of policy is, in effect, also an outline of the committee discussion of planning. A policy is a plan, sometimes of limited scope at other times containing implications for a large number of services and activities. A recommendation for policy, also a plan, is not, of course, policy itself. Once a faculty committee makes a policy recommendation, that recommendation must pass through the normal constitutional channels on campus. All policies, thus, are plans, but not all plans are policies.

Many times committees go through steps one, two, and three in the discussion of policy but not steps four and five. They are planning, but it is highly ineffective planning. Some policies are either not implemented or

only partially implemented because they contradict other policies or because they possess adverse budgetary implications, implications not envisioned by the committee but all too apparent to the people charged with the administration of these policies. In such a situation, where the faculty initiates policy but the administration fails to implement it, lie the materials for a long and deep seated conflict between teaching faculty and administrators.

To recapitulate, the entire policy making process consists of:

Deliberation about plans	+	Operation	+	Evaluation

At Silver Lake College deliberation about plans occurs in policy initiating committees, in effect mini planning committees. Committee recommendations go to the faculty for further discussion and a vote. Recommendations receiving faculty support are forwarded to the President via the administrative officer charged with the oversight of the area about which the policy recommendation pertains. She recommends that the President accept or reject the policy recommendation or return it to the initiating committee and states her reasons. The President then decides which alternative to choose. This entire process, and the description here is oversimplified, from the initial discussion of a policy in committee to the Presidential decision is represented in the diagram by the phrase "Deliberation about plans."

"Operation" simply means putting the plans into effect, the task of the administration. "Evaluation" consists of feedback and revision based on that feedback. In effect, the revision is the new planning and the entire process is repeated.

The CCCP might become involved -- and it is necessary to emphasize the tentative and problematic nature of this involvement -- at three stages in

the policy making process. A standing faculty committee might desire the CCCP to comment informally upon a proposed policy in the light of the current college objectives or the existing all-campus plan prior to submitting the policy to the faculty. The initiative in this instance would lie entirely with the faculty committee. In most instances such a request might be both unnecessary and unwise. Certain extraordinary conditions might suggest the wisdom of such an approach to a standing committee. The option exists for those occasions. Even when a committee referred a matter to the CCCP, the comments of the CCCP would not restrict its freedom of action.

The second instance in which the CCCP might become involved in policy formation is after the faculty has recommended a policy and sent it to the appropriate administrator for comment or approval. The administrator might desire the CCCP to comment upon the relationship between the proposed policy and current collegiate objectives or the current all-campus plan or to re-study the financial impact of the proposed change. In this situation the CCCP would be acting like any other administrative committee, providing staff support for the administration.

Finally, once the college officially adopts a policy, the CCCP must ensure that it is incorporated in all unit plans and in the final draft of the all-campus plan.

The relationship between the CCCP and the faculty committees is not a gratuitous one; it is a relationship necessitated by the fact that policy making and planning are inseparable functions. In order to effectively coordinate the planning process the CCCP needs information about plans; in order to prevent duplication and working at cross purposes it needs to comment about plans. It does not need the authority to approve or disapprove plans,

and this authority it does not possess.

The relations of faculty committees to the planning process is both subtle and complex. At one level the committees generate policy recommendations. These policy recommendations are plans, but the committees also plan at another level as well, a level best described by the discussion of planning at the beginning of the Introduction: "What am I going to do?" The faculty committees are organizations with the need for a sense of purpose and an agenda to achieve their purposes. The committees not only produce policy recommendations but they have to plan their own activities -- plan about how and when to consider certain policy areas that lie within their responsibilities. In this sense, the planning of committee activities, the faculty committees are dealing with a strictly internal matter about which they need not inform the CCCP. Faculty committees do not generate a budget and therefore need not prepare a formal plan describing their activities.

Administrative Committees

Administrative committees perform three primary functions at Silver Lake College:

1. They provide connecting links by facilitating the exchange of information between various offices engaged in the same administrative processes;
2. They allow a review of the implementation of interoffice policies and procedures;
3. They furnish staff support for certain administrative functions.

In the performance of the second function, an administrative committee might decide to recommend an interoffice procedure. It might want informal comments upon from the CCCP regarding the congruence between the innovation

and the college's objectives or existing all-campus plan. The administrator charged with accepting or rejecting the committee's recommendation might also desire the CCCP's comments upon these matters. In each instance the initiative for such requests lie with the administrative committee and administrator and are in no sense required. The CCCP should be informed once such changes are implemented in order to keep the all-campus plan current.

In contrast to the policy recommendations of faculty standing committees, administrative committees make procedural recommendations infrequently and consequently, they are even more episodically involved in the planning process. Like the standing committees, administrative committees do not generate a budget. Planning their own activities is therefore an entirely internal procedure.

Ad hoc Committees

Ad hoc committees are appointed by either the administrative officers of the college or by committees, either standing or administrative. They have only a limited life span. The administrator or committee which establishes the ad hoc committee may specify the time of termination by either designating a particular date or by indicating the completion of a certain task. The report of an ad hoc committee is simply that, a report. If it includes recommendations about policy changes, then the recommendations must go through the normal governance procedures for the adoption of policy changes. If the changes recommended do not involve policy, then the appropriate administrator still has to approve them. Only those ad hoc committees which are created to act as subcommittees of the CCCP, such as the EAC, must report to the CCCP. All others have the option but not the requirement of obtaining comments from the CCCP before submitting their final reports as do the administrators and committees to whom the reports are submitted. Like other committees ad hoc committees

plan their own activities without necessarily reporting them to the CCCP.

C. The Staff Support for Planning at Silver Lake College.

Staff support for planning at Silver Lake College basically falls into two major categories: that provided through the Assistant Academic Dean's Office and that provided by the other administrative offices in their capacity as collectors for information.

The Assistant Academic Dean's Office

The Assistant Academic Dean performs four functions closely related to the planning process on campus:

1. As the On-Campus Coordinator (OCC) of the Small College Consortium (SCC), he administers the Institutional Development Project (IDP) on the Silver Lake campus. The IDP is the name of the program funded by the Office of Education under Title III of the Higher Education Act of 1965 which provides the money needed to establish and implement the planning process. The SCC is the organization (of which the college is a member) that oversees the operation of the IDP.
2. He acts as the de facto planning assistant during the planning cycle. He serves as a resource person to assist departments, disciplines, and offices, on questions of format and procedure. Any such questions the answers to which appear to raise questions of policy regarding the planning process, he will refer to the CCCP.
3. He is the director of institutional research on campus. In this role he is primarily a coordinator of information generated by other offices, although in some instances he may actually collect and analyze information not collected by any office. The CCCP provides oversight for all information collection and research reports related

to the planning process.

4. He is the acting chairperson of the CCCP, a task he performs because his duties as OCC require him to learn in detail the various federal and consortium regulations regulating the expenditure of monies in the IDP.

In addition, Mrs. Catherine Hauschulz works as a half-time secretary in the Assistant Academic Dean's Office. In certain instances she can assist the units in typing their unit plans, but primary responsibility for this function lies with the departments, disciplines, and offices themselves.

The Other Administrative Offices

The Admissions Office, the Business Office, the Development Office, the Financial Aids Office, and the Registrar's Office are the offices which will supply the information of greatest importance in developing realistic plans. This information and its uses will be discussed in detail in part four.

D. The Planning Calendar.

The planning calendar provides a means of monitoring and coordinating activities within the planning process. Essentially it states who should perform tasks and when. Preparation of the planning calendar is the responsibility of the CCCP. The master calendar is kept in the faculty development center with current activities highlighted by a green overlay. Late activities are highlighted by a red overlay. The Assistant Academic Dean carries the responsibility of keeping the calendar updated.

Dates are listed along the left hand margin of the master calendar. Units and groups are listed along the top. The first two columns refer to the CCCP, the first to the activities performed by the CCCP, the second to the documents produced. In all subsequent columns, activities and documents are intermingled.

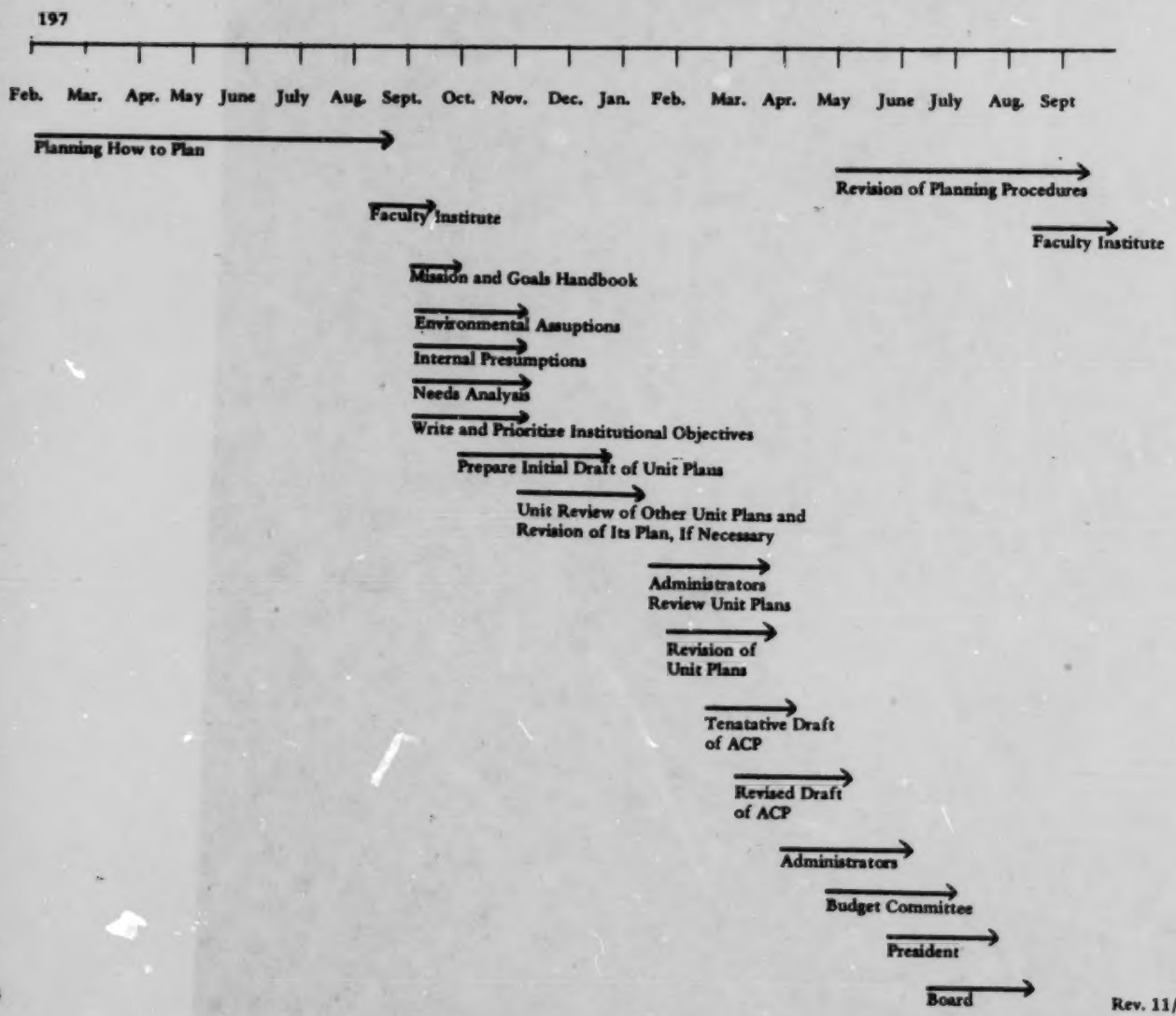
The third column refers to the planning consultant, the fourth to the SCC Advisor to the College, the fifth to the On Campus Coordinator, the sixth to the faculty, the seventh to standing committees, the eighth to ad hoc committees, the ninth to administrative committees, the tenth to departments or disciplines, and the eleventh to administrative staff offices.

The Timing of the Annual Planning Cycle

A copy of the master calendar is too bulky for inclusion in this manual, but the abbreviated calendar included (see Figure III) does provide a graphic illustration of the process. Planning how to plan -- choosing the planning procedure best suited for Silver Lake, adapting it to the constitutional and administrative arrangements already in existence, preparing a planning calendar, and writing the "Planning Procedures Manual" took the months from February through November. The faculty institute in late August provided an opportunity for the CCCP to report about its activities to the faculty and to familiarize the faculty with the planning process. During the faculty institute the faculty members reviewed the collegiate mission and goal statements.

During normal years (the preparation of the self study for the North Central Association accreditation review delayed the process this year), the EAC will prepare the environmental assumptions. Normally, they should be published by the first week in October. Simultaneously, the CCCP will specify the institutional internal presumptions and prepare a needs analysis. It may also begin work upon the institutional objectives, although it cannot complete the final draft and prioritize them until the preceeding steps are completed. Once the institutional objectives are published in final form to the college community, the units may begin work on their unit plans, usually mid October, although here too overlap may occur. The units may desire to

FIGURE III: ABBREVIATED PLANNING CALENDAR


197
Feb. Mar. Apr. May June July Aug. Sept. Oct. Nov. Dec. Jan. Feb. Mar. Apr. May June July Aug. Sept
Planning How to Plan
Revision of Planning Procedures
Faculty Institute
Faculty Institute
Mission and Goals Handbook
Environmental Assuptions
Internal Presumptions
Needs Analysis
Write and Prioritize Institutional Objectives
Prepare Initial Draft of Unit Plans
Unit Review of Other Unit Plans and Revision of Its Plan, If Necessary
Administrators Review Unit Plans
Revision of Unit Plans
Tenatative Draft of ACP
Revised Draft of ACP
Administrators
Budget Committee
President
Board

CP f4

Rev. 11/77

complete certain preliminary steps such as the writing or review of unit mission and goal statements, unit presumptions, etc., before this date. Once the initial drafts are complete they will be circulated among the other units affected. The deadline for beginning this stage in the planning cycle is December 1, but some units may have completed their plans as early as mid-November if not earlier. The review process should be complete by December 15. The units then have until mid-January to revise their plans and submit them to the appropriate administrative officer for comment. The critique of these plans and any revision the units decide is necessary should be finished by March 1, when the CCCP begins writing the all-college plan. The committee should have a revised draft of the plan ready for submission to the administrative officers no later than April 1. The administrative officers should submit the components of the plan subject to their approval to the Budget Committee by April 20. Whatever changes the Budget Committee believes are necessary in the plan should have been negotiated between it and the CCCP by June 1, the last possible day for transmittal to the President. If she approves of the plan, she may send it to the Board of Trustees with the budget in June.

This discussion of planning calendars has centered upon college-wide activities. Units may desire to prepare calendars which focus exclusively upon their activities. Such an action may prove very helpful to the unit. The only restriction on its discretion is that it must honor all the deadlines set forth in the master calendar.

III. Track II: Writing Plans

Hopefully, the preceeding section has not unduly discouraged anyone. The actual writing of plans is a good deal more straight forward, sometimes, than the delineation of responsibility for writing plans. This section concentrates on the latter and seeks to:

1. review some checklists of steps in planning;
2. present and explain a format for planning.

A. STEPS IN PLANNING

While planning is not particularly difficult to visualize as a concept or to implement as a procedure, it does contain pitfalls like any other endeavor involving people. One of the most common difficulties is simple forgetfulness, neglecting to perform some vital aspect in the process. One way to mitigate this hazard is to develop a rule of thumb as an aid to memory, for example GOSPEL:

Goals

Objectives

Strategies

Programs

Evaluation

Looping

Translated into a descriptive statement GOSPEL means that planners first develop a set of written goals flowing from the institutional mission statement. They then write objectives that implement the goals and prioritize the objectives. "Strategies" means devising alternative strategies to achieve the objectives and selecting the most appropriate. The institution then implements the resulting programs. It evaluates the programs after they have been in effect for

a specified length of time. Usually an evaluation should occur at least once every twelve months. Looping refers to beginning the process again on an annual cycle.

While GOSPEL satisfies the first precondition of any good memory aid in that it is memorable, it does not fulfill the second, which is that it helps people remember all that they need to remember. GOSPEL says nothing about needs analysis, cost, or information collection.

Needs analysis, step four in the college's planning cycle, is a phrase used by planners to describe a process which uses a sophisticated awareness of institutional strengths and weaknesses to delineate problem areas. For example, a discipline may be strong in one area but weak in another, yet because of limited funds any attempt to strengthen the weak area would only act to diminish the quality of the strong area. An outside evaluator with only a superficial understanding of the situation might recommend strengthening the weak area. A more correct response might be to maintain the quality of the strong area, particularly if it is a unique program attracting many students.

Needs analysis should occur after the goals have been written but before objectives are finalized. It will assist planners in establishing priorities among the objectives. Add needs analysis to GOSPEL and the result is GOSPEL plus.

Planning to be useful must be used. If it is to be used, the plans produced must be practical and realistic. One way to ensure these characteristics is to require that planners place some estimate of the costs involved on their proposal. When cost is added to GOSPEL, the result is GOSPEL double plus.

Information gathering (discussed in the next section of this manual) has also been omitted from the acronym. When added, the result is GOSPEL triple

plus.

The more elements that refuse to fit into a memory aid, the less useful it becomes. GOSPEL, while amusing, is not as usable as it should be.

Greg Markovich takes a somewhat different approach. Planning according to Markovich consists of:

Goals

Objectives

External Assumptions

Internal Presumptions

Needs Analysis

Data Collection

Alternative Strategies

Budgeting Implications

Piloting

Feedback

Adjustment

Implementation

Evaluation

The terminology is somewhat different but many of the concepts are similar. "External Assumptions" refer to those factors outside the institution or unit which affect its operation. "Internal Presumptions" refer to institutional "givens," such as the fact that a liberal arts college will always offer courses in one or more foreign languages so long as it desires to offer a bachelor of arts degree. "Piloting" is a new concept. It refers to the technique of testing an innovation on a small scale before implementing throughout the institution. As a description of a process GOEINDABPFAIE

is superb; as a memorable acronym it leaves something to be desired.

B. A FORMAT FOR PLANNING AT SILVER LAKE COLLEGE

Rather than depend upon acronyms, the procedure of planning outlined in this section relies upon a series of all-college planning forms, ACP 1 through ACP 8, to guide units in planning. The existence of these forms does not mean that each unit must fill out every one; their chief purpose is as memory aids to assist units to plan in an orderly fashion. The only one which a unit must fill out is the last one in the sequence, which is the unit plan. Only it needs to be forwarded to the CCCP.

At the beginning of their work on planning, each unit will receive filled out copies of ACP 1, a report prepared by the CCCP upon institutional mission and goals, ACP 2, the report of the Environmental Assumptions Committee, ACP 3, a report on institution-wide presumptions and needs prepared by the CCCP, and two copies of ACP 7, the first a report prepared by the CCCP upon the priorities among the one year institutional objectives, the second a report prepared by the CCCP upon the priorities among the five year institutional objectives. The units then use forms one and four through eight with one exception. Offices will use ACP 4 and omit ACP 5; departments and disciplines will use ACP 5 and omit ACP 4. Just like the CCCP, the units will prepare a statement of objectives for one- and five-year periods, but during the first years of following the procedure, they will prepare a detailed plan with an estimated budget for only the upcoming fiscal year. The reasons for adopting such a rule arises from the fact that long-range planning on the unit level is a new procedure with which no one on campus possesses any practical experience and will undoubtedly require more time to implement because of this fact. The experience of the other colleges entering into all-campus planning has been that during the first

years of the program they have been unable to progress beyond one-year plans. Under the circumstances, the preparation of five-year objectives becomes very important, as Professor Schroeder points out, because they help provide a sense of direction in preparing the one-year objectives. The one-year objectives should represent actions toward the fulfillment of five-year objectives.

The preceding gives an overview of the planning format at the college. What follows is a detailed discussion of each form in the all-campus planning process and the information contained on it.

ACP 1, the "Mission and Goals" contains three data elements which are found on all of the forms. The first data element is the "Subject," a one or two line synopsis of the report, such as "Statement of Environmental Assumptions for the Academic Year 1978-1979." The other two common elements, "Date" and "Unit Generating Document" are self explanatory.

Two data elements are unique to this form, a mission statement and goals. Every unit in the institution can prepare a mission statement, a general overview of its purpose, and the goal statements designed to carry it into effect.

At the bottom of the form are two elements that are part of the format that deserve an explanation. "ACP 1" in the left-hand corner indicates that it is the first stage in the all-campus planning process, "8/77" in the lower right-hand corner indicates that this is the initial format for ACP 1 issued in August 1977. If this was a revised format, the lower right-hand corner would contain Rev. 8/77, meaning the first revision of the format, prepared during August 1977. A second or third revision of the format is indicated by 2 Rev. 8/77 or 3 Rev. 8/77.

ACP 2, "Environmental Assumptions Worksheet," contains five new data

elements which are self explanatory -- student population, finances, recruitment and retention, employment opportunities, educational competition and constraints.

ACP 3, "Needs Analysis Worksheet: Institutional Form" contains "Internal Presumptions," "Collegiate Strengths," and "Collegiate Weaknesses."

ACP 4, "Needs Analysis Worksheet: Office Form" contains the data elements "General Environmental Trends Which May Affect the Unit," "Trends Within the Collegiate Environment Which May Affect the Unit," "Internal Presumptions," "Unit Strengths," and "Unit Weaknesses." The first of these data elements might include such considerations as anticipated changes in federal audit procedures, which would affect any unit handling federal funds. The second might include for example, an assumption by the Development Office that the college would not create a separate office for alumni affairs during the period covered by the plan. If true, such an assumption would have considerable impact upon the anticipated work load of the Assistant to the President for Development.

ACP 5, "Needs Analysis Worksheet: Department-Discipline Form," is a modification of ACP 4 to meet the needs of departments and disciplines. In addition to "Other General Environmental Trends Which May Affect the Unit" it includes "Trends Within the Discipline(s)" divided into four components: "Changes in Content," meaning in most cases changes in the emphases within the discipline (for example traditional political history is now somewhat passé while social history is very fashionable); "Changes in Methodology" refers to the manner in which the discipline validates information; "Attractiveness to Students," indicates how popular the discipline is to students and hopefully will give the members of the discipline an opportunity to reflect upon how to increase its attractiveness; and "Market(s) for Graduates" allows members to

reflect upon the career opportunities available to majors upon graduation.

ACP 6, "Goals and Objectives," permits members to write one or more objectives to implement each of the goals listed in ACP 1 and to indicate the activities designed to carry the objectives into effect, while ACP 7, "Prioritized Objectives Worksheet" reminds planners of the need to rank objectives in order of importance.

The eighth and final form, ACP 8, "Planning Worksheet" attempts to consolidate all of the concepts previously encountered in forms ACP 1 through ACP 7. The primary focus in this document is strategy, defined as a collection of related actions tending to produce some desired result. Each unit will produce one ACP 8 for each strategy it devises, although some data elements which would require repetitions, can be ignored after the unit fills out one ACP 8. For example, unit P may have seven objectives of which it regards A, B, and C as of primary importance and D, E, F, and G as of secondary importance. A, D, and G are closely related as are B and F and C and E. Therefore unit P devises strategy x to accomplish A, D, and G, strategy y to obtain B and F, and strategy z to achieve C and E. It writes three separate ACPs and submits them to other units and to the administration under a cover letter which states the number of "Planning Worksheets" enclosed. The unit would need to fill out the "External Environmental Assumptions" and "Internal Presumptions" data elements on one form only.

"External Environmental Assumptions" refer to anything outside the unit; they may include a statement from ACP 2 if it is relevant to the unit in question; it may include a condition in another area of the college which will influence its operation; or it may include some item listed under the "General Environmental Trends Which May Affect the Unit" of ACP 4 or the "Trends Within the

Discipline(s)" of ACP 5.

"Internal Environmental Presumptions" relate to givens within the unit.

The "Alternative Strategies" category requests the unit to devise more than one way to reach the desired result, if more than one appears feasible. The "Strengths and Weaknesses" line asks for an enumeration of the advantages and disadvantages of each strategy. This form does not include the category "Piloting," which Greg Markovich emphasizes in his approach to planning. Rather this is regarded as one of the strategies which the unit may recommend for implementation.

The "Recommendation" is the preferred strategy.

"Anticipated Effects Upon College Operations" asks for an estimate of the effect of the strategy on other units of the institution.

"Budgetary Implications," "Actions Required Prior to Implementation," "Date for Implementation," and "Who Should Implement the Recommendation" are self explanatory. The next data element, "Process and Strategies for the Evaluation of the Recommendation Once Put Into Operation" asks the question how shall the college measure the degree to which the objectives are achieved.

"Unit(s) Responsible for Evaluation" should include a statement of the unit responsible for collecting the information and to whom it should be sent. In all instances copies of such information should be forwarded to the CCCP.

"Recommended Frequency of Evaluation" will vary according to circumstances. In some instances it might be monthly, in others once a semester or once an academic year.

It is not necessary that a unit fill out all of these forms, but it should go through all of the processes represented by the forms. The forms themselves follow on the next eleven pages.

SILVER LAKE COLLEGE

MISSION AND GOALS WORKSHEET

Subject:

Date:

Unit Generating Document:

Mission Statement:

Goals:

SILVER LAKE COLLEGE

ENVIRONMENTAL ASSUMPTIONS WORKSHEET

Subject:

Date:

Unit Generating Document:

Student Population:

Finances:

Recruitment and Retention:

Employment Opportunities:

Educational Competition and Constraints:

SILVER LAKE COLLEGE

NEEDS ANALYSIS WORKSHEET

Institutional Form

Subject:

Date:

Unit Generating Document:

Internal Presumptions:

Collegiate Strengths:

Collegiate Weaknesses:

SILVER LAKE COLLEGE

NEEDS ANALYSIS WORKSHEET

Office Form

Subject:

Date:

Unit Generating Document:

General Environmental Trends Which May Affect the Unit:

Trends Within the Collegiate Environment Which May Affect the Unit:

Internal Presumptions:

Unit Strengths:

Unit Weaknesses:

SILVER LAKE COLLEGE

NEEDS ANALYSIS WORKSHEET

Department-Discipline Form

Subject:

Date:

Unit Generating the Document:

Trends within the Discipline(s):

Changes in Content:

Changes in Methodology:

Attractiveness to Students:

Market(s) for Graduates:

Other General Environmental Trends Which May Affect the Unit:

Trends within the Collegiate Environment Which May Affect the Unit:

Internal Presumptions:

NEEDS ANALYSIS WORKSHEET
Department-Discipline Form

Unit Strengths:

Unit Weaknesses:

SILVER LAKE COLLEGE

GOALS AND OBJECTIVES WORKSHEET

Subject:

Date:

Unit Generating Document:

Mission Statement:

Goals	Objectives	Activities

SILVER LAKE COLLEGE

PRIORITIZED OBJECTIVES WORKSHEET

Subject:

Date:

Unit Generating Document:

College or Unit Objectives in Order of Priority:

SILVER LAKE COLLEGE

PLANNING WORKSHEET

Subject:

Date:

Unit Generating Document:

Mission:

Goal(s):

Objective(s):

External Environmental Assumptions:

Internal Environmental Presumptions:

PLANNING WORKSHEET

Alternative Strategies:

Strengths and Weaknesses:

Recommendation:*

*Cite supporting evidence

PLANNING WORKSHEET

Anticipated Effects Upon College Operations:

Budgetary Implications:

Actions Required Prior to Implementation:

Date for Implementation:

Who Should Implement the Recommendation:

Process and Strategies for the Evaluation of the Recommendation Once Put Into Operation:

Unit(s) Responsible for Evaluation:

Recommended Frequency of Evaluation:

_____
(Signature)

IV. Track III: Planning Information

There are two basic reasons for collecting information insofar as planning is concerned:

(1) to enable the people involved in planning to set realistic objectives for themselves, their units, and their institution;

(2) to allow continuous monitoring of the degree of success or failure of the plan once adopted and to provide some basis for determining the reasons for this success or failure.

As indicated in the previous section, information which affects the plan includes data generated both inside and outside the institution. The collection of external data and its conversion into usuable form is the responsibility of the Environmental Assumptions Committee. This section deals entirely with internal information, specifically with information needed at the level of the campus-wide planning committee. This information will also assist the various units, although they may discover additional information needs in the course of their work.

The information needed by the CCCP and other planning bodies may be placed in five categories: student information; faculty information; program information; facilities information; and financial information. Student information speaks to questions about the kinds of markets from which the school attracts students, the needs and expectations of students, their degree of satisfaction with their Silver Lake experience, and the occupational success of graduates. Student information in conjunction with external data should provide the basis for accurate enrollment projections and should give some indication of the subtle ways in which the characteristics of the incoming freshmen are changing the character of the school. The second major type of

information, faculty information, deals with such questions as faculty workload, projected needs for new faculty, and the degree of interaction between students and faculty. Program information refers to information regarding the curriculum, for example the information collected in the manner developed by Father Thomas Ostdick of St. Meinrad College as well as such information as the frequency with which a course is offered and the number of students who take it. Facilities information includes such items as the degree of use and satisfaction given certain types of academic resources, such as audio visual equipment, television, etc., the amount of use of physical facilities, e.g. classrooms, the library, etc., and projected maintenance and equipment replacement costs. Financial information consists of information specifying the relation of tuition policy to enrollment, information pertaining to the development process, and aggregate financial projections.

The chart which follows indicates the type of information, the office responsible for the collection of the information, the office responsible for the analysis or interpretation of the information, the form of information needed (a number, percent, ratio, etc.), the frequency with which the information needs to be collected, the objective or reason for collecting the information, i.e. the use to which it will be put, and the capability presently on campus to collect and analyze the information in the manner specified. Some of the kinds of information are self explanatory, as "class size by geographic area of origin;" others are much more complex, as "tuition policy as it relates to enrollment projections." The information in the last example could be obtained only after some very involved calculations.

The purpose of the chart is not to suggest that all of this information must be collected each year. Rather it attempts to inventory the kinds of

FIGURE IV: PLANNING INFORMATION

TYPE OF INFORMATION	Office Responsible for Collection	Office Responsible for Analysis	Form	Frequency	Objective	Capability
1. STUDENT INFORMATION						
Class size by						
Geographic area of origin (fr & t)	R	R & AAD	%	an	To indicate the areas from which SLC draws most of its students	3
Parental income (fr & t)	FA	FA & AAD	%	an	To indicate the amount of financial aid needed by most students	3
Number of other family members who are college graduates (fr & t)	?	?	%	an	To suggest the amount of parental support for the student	3
Number of books at home (fr & t)	?	?	%	an	To suggest the degree of parental support, student preparation and student completion of a degree program	?
Number and type of outside activities (as)	?	?	%	an	To suggest student interests and provide information for use in retention strategies	?
Religious affiliation (fr & t)	R	R & AAD			To suggest admissions retention and student services strategies	3
Lay/religious (fr & t)	R	R	%	an	Same as above	3
Sex (fr & t)	R	R	%	an	Same as above	3
Age (fr & t)	R	R	%	an	Same as above	3
Full time/part time attendance (as)	R	R	%	an	Same as above	3
Employed while attending school - full/part time (as)	?	?	%	an	Same as above	3
Attrition rate (as)	R	R & AAD	%	es	To indicate the degree of success in the retention effort	3
Attrition reasons (as)	AAD	AAD	?	o	To assist in locating weaknesses in the retention effort and program offerings	2
High school rank (fr)	A	A	%	an	To indicate the degree of academic commitment of the student and to assess the effects of the admissions effort.	3
ACT Score (fr)	A	A	%	an	Same as above	2
Majors (as)	R	R	%	an	To indicate the degree of popularity among the disciplines and to develop a historical data base to allow projections of future munbers of majors	3
Time to complete degree -full time/part time, transfer/SLC freshmen matriculators (as)	R	R & AAD	%	an	To indicate the average length of time students take to graduate as an aid in developing enrollment projections	2
Occupations of graduates (as)	SP&Al	SP, Al & AAD	%	an	To provide input into curriculum revision, placement, and the admissions effort	
Employed/Unemployed graduates (as)	SP&Al	SP, Al & AAD	%	an	Same as above	
Student climate (as)	AAD	AAD	?	s	To provide some indication of areas of student satisfaction and dissatisfaction	2
Admissions Process: Ratio of number of inquires to number of "hot prospects" to applicants to matriculating students (fr)	A	A & AAD	Ratio	an	To provide a clear picture of the admissions effort to demonstrate any weak links in the process, and to suggest remedies	2
Enrollment projection (as)	A & R	A & R	Number	s	To provide a better basis for detailed enrollment projections by major field of study	1
2. FACULTY INFORMATION						
Instructional outputs	depts (?)	depts. & AAD	Number	an (?)	To exhibit high and low instructional output levels by department and the associated causes	?
Contacts with students outside the classroom	depts.	depts. & AAD	?	an	To establish some norms for faculty student interaction and provide information for retention and student services efforts	
Projected retirement of religious faculty and staff	P & AD	P & AD	Number	o	To provide an accurate projection of future personnel costs	1
Percentage of credit hours by departments/disciplines	AD	AD	%	an	To provide a measure of the workloads carried by departments/disciplines	2
Percentage of budget allocated to departments	AD & B	AD	%	an	To provide some comparisons of the allocation of resources among various collegiate units	2
Unit Cost Analysis	R & B	R, B, & AD	Number	bi (?)	To develop a system of calculating unit costs of instruction and cost per degree granted and to develop a means of using this data to project costs	2

3. PROGRAM INFORMATION						
Curriculum Evaluation	AD & f	AD, c, dc	wm	tri	To provide a wholistic view of the curriculum	2
Frequency of Course Offerings	AD & R	AD, c, dc	%	an	To identify courses which are not being offered	3
Number of Students Taking Courses	AD & R	AD, c, dc	avg	an	To identify courses which have very small or very large enrollments persistently	3
4. FACILITIES INFORMATION						
Utilization of academic resources by department/ discipline (AV,TV, etc)	?	offices & AAD	?	an	To indicate the amount of use by students and faculty by department/discipline and thereby establish a measure of the degree of return on the investment which each resource represents and to suggest ways of more fully utilizing them	2
Utilization of physical facilities (library, rec. room, cafeteria, etc.) by students and their degree of satisfaction	?	offices & AAD	?	an	Same as above and to provide information for the development of student services and retention strategies. Examining usage by hours, days, and type of facility may assist in the development of improved scheduling practices	2
Projected maintenance and equipment replacement costs	B &PP	B & PP	Number	bi	To allow the units to incorporate maintenance and equipment replacement expenses into their plans	?
5. FINANCIAL INFORMATION						
Tuition policy as it relates to enrollment projections	FA, R, & A	FA, R, A&AAD	?	?	To develop relationships between tuition charges and future enrollment levels. Such studies can help predict the effect of raising or lowering tuition on institutional income	0
Development process: % of gifts by size compared to previous years donations by time of year	D	D & AAD	% & Number	an	To establish some measure of the effectiveness of the development effort and to provide information for a more refined development strategy	2
One year financial projection	B	B & P	Number	es	To allow the unit plans to include budget estimates	3
Aggregate financial projections	B	B, AAD, & P	Number	bi	To examine the structure of budgets and the difference in growth rates between important components of income and expense	0

KEY:

A	Admissions Office	c	department chairpersons	fr	freshmen
AAD	Assistant Academic Dean's Office	D	Development Office	P	President's Office
AD	Academic Dean's Office	dc	discipline coordinators	PP	Physical Plant Office
Al	Alumni Office	depts.	departments/disciplines	R	Registrar's Office
an	annual	es	each semester	SP	Student Personnel Office
as	all students	f	faculty	ss	sample of students
avg	average	FA	Financial Aids Office	t	transfer students
B	Business Office	o	once, ie. will not need replication for at least five years	tri	triennial
bi	biennial			wm	weighted mean

Capability

0	1	2	3
Not done and no knowledge about how to produce the information			Information already collected in the form desired or easily converted to the form desired

Rev. 11/77

information that might assist people involved in the planning process. The more complex forms of information listed on the chart will require considerable time to develop, both in terms of the time needed to retrieve the data and in terms of the time needed to select and perform the appropriate mathematical computations.

Deciding what information would assist planners is but part of the problem; it is also necessary to determine when they will need it. "As soon as possible" is a phrase applicable only to those gatherers of planning information who are idealists or who possess a computer. A dispersion of reporting dates over the academic year ensures that no one office or the all-campus planning committee is overwhelmed with masses of data at one time.

In order to facilitate unit planning the student information, in particular the number of students by major discipline, should be collected by November 15 of each year. Such a deadline will allow the development of an enrollment projection prior to the time that the units submit their preliminary plans. The business office will need some kind of estimate of new students if it is to project the next year's income, an essential prerequisite for any kind of realistic unit planning.

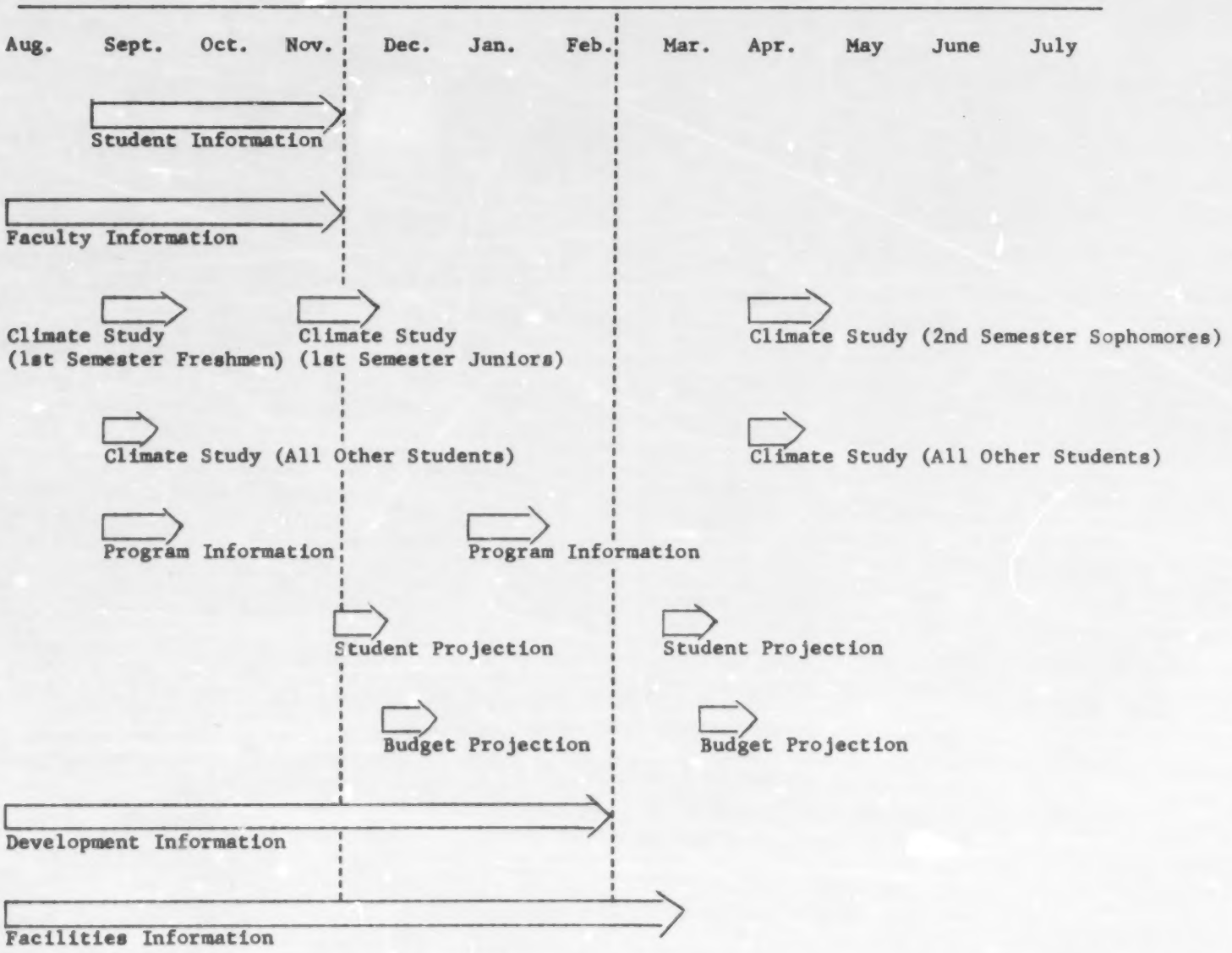
The Office of Institutional Research should collect some student climate data from all classes every semester, but it should attempt really elaborate studies only at the beginning of the first semester of the freshman year, the end of the second semester of the sophomore year, the end of the first semester of the junior year, and, perhaps, immediately after graduation.

Faculty and program information required on an annual basis should be collected and analyzed by November 15 with an up date on the program information during the second semester, but information about the development process

need not be reported before February 15. Facilities information should be completed by the end of March. Because most of this information is designed to lead to projections, it should be usuable in unit planning during the following year. The Business Office will need to make a budget projection for the next fiscal year at least twice during the annual planning cycle, once in late November to provide figures for the unit planning and once in late March to provide updated figures to the Campus Core Committee for Planning prior to the writing of the first draft of the all-campus plan.

The timing of planning information reports is illustrated by Figure V: "A Calendar for Planning Information."

FIGURE V: A CALENDAR FOR PLANNING INFORMATION



V. Conclusion: Some Observations on Implementation

The primary difficulty in producing a planning manual which seeks to spell out planning procedures in some detail is that the finished product intimidates the uninitiated by its very bulk, its apparent complexity, and its esoteric terminology. While planning is a simple, everyday process in which all human beings engage, the coordination of these activities is more complicated, and describing it accurately is perhaps the most complicated of all. This manual is no different, and its main function is that of a reference work.

In the implementation phase planners must seek to avoid those characteristics which appear to be the very essence of planning manuals -- cumbersome, tedious, and bureaucratic. Planning is after all a human process and it is the humane qualities of spontenaity, innovation, and informality which planners should attempt to tap. Only if planning gives the participants an opportunity to exercise these capabilities will it become a viable and continuing part of the life of the institution.

Two simple rules may assist in implementing the planning process. First, always allow for flexibility. Deadlines may not be met. If the practice becomes habitual it may indicate that the deadlines are unrealistic or that the people involved need more training in or experience with the process. In either instance morale may decline. Inventive planners will allow time for regrouping and will anticipate ways in which they can bolster the spirits of their compatriots. Second, continually review processes, procedures, formats, and information needs. Eliminate those elements which prove irrelevant to real problems.

So far, these observations have focused upon implementation of the

planning process, but there is another kind of implementation which is even more important than it, implementation of the product of the process -- the plan. A plan is nothing more than a guide for future actions; it is not a straight-jacket. Changing circumstances may render even the most intelligently conceived plans irrelevant. Even when a plan accurately anticipates events, its existence does not contravene the principle of administrative discretion. A special case still requires a unique response. The most successful plans provide a broad overview and leave the details for the future.

Appendix I

A GLOSSARY OF ACRONYMS AND PLANNING TERMS

ACP	All-Campus Plan, the term which refers to both one-year and five-year plans. An all-campus plan includes all the departments and offices on campus which generate a budget.
Assisting Agency	An organization which provides expert advice to a consortium funded under Title III.
Averett College	The coordinating institution of the Small College Consortium.
CASC	The Council for the Advancement of Small Colleges, an organization of private universities and four-year colleges with student bodies of less than 2000. It wrote the initial Title III proposal for the Institutional Development Program and acts as an assisting agency for the Small College Consortium.
CCCP	The Campus Core Committee for Planning, the committee which provides oversight for all Small College Consortium activities on campus, coordinates the planning process, and writes the final draft of the all-campus plan.
CGP	College Growth Plan, a term which refers to the anticipated activities of the college in the Small College Consortium over the four-year period of its existence.
Climate Study	A survey instrument designed to sample student and/or faculty reaction to the institution.
College Advisor	One of the members of the central staff of the consortium who works closely in all the technical assistance areas with a selected group of member schools. The advisor visits each of the schools which he assists two or three times a year.
Coordinating Institution	A member school of a consortium funded under Title III that is responsible legally to the federal government for the consortium's compliance with federal regulations. It receives all disbursements from the federal government and distributes the allotments to the member schools.

EAC	The Environmental Assumptions Committee, an ad hoc subcommittee of the CCCP which drafts a statement of environmental assumptions, provides a forum for faculty reaction to the assumptions, and makes a regular updating of the assumptions throughout the year.
Environmental Assumptions	Anticipated occurrances off-campus during the period of time covered by the all-campus plan which may affect the ability of the college to carry out the plan.
External Assumptions	Environmental assumptions at the unit level.
Facilities Information	All information about the physical plant and equipment used in planning.
Faculty Information	All information about the instructional staff used in planning.
Fiscal Information	All information about cash flow used in planning.
Goal	A statement of how an institution intends to fulfill its mission. Goals are more specific than a mission statement, but they still retain a sizable ideal content.
HEW	The Department of Health, Education, and Welfare, the cabinet-level agency in the federal government responsible for administering Title III funds.
IDP	The Institutional Development Project, the title of the program administered by the Small College Consortium which received Title III funding beginning in the 1976-77 academic year. It contains four major components called technical assistance areas.
Interface	A term specifying all the formal and informal relationships between one unit and another.
Internal Presumptions	The givens within an organization or subunit of an organization.
Mission	The broadest possible statement of institutional purpose. It is timeless and unchanging and often represents an ideal condition, a guide for action rather than an achievable situation.
Objective	A clear, concise, specific statement of an anticipated outcome expressed, when possible, in quantifiable terms.

OCC	On-Campus Coordinator, an employee of a member school of the Small College Consortium charged with administering the IDP on his campus.
OE	Office of Education, the agency within HEW specifically charged with the oversight of Title III funds.
Piloting	A procedure involving the implementation of an innovation upon a small scale in order to test its practical efficacy before attempting any institution-wide applications.
Planning	A procedure which involves institutions or individuals determining what they need, how best to fulfill the need, and -- after making the attempt -- to what extent they succeeded.
Planning Assistant	A person charged with the responsibility for gaining a detailed knowledge of planning procedures and acting as a resource person to assist the offices and departments engaged in planning. At Silver Lake College the Assistant Academic Dean acts as the de facto planning assistant.
Planning Calendar	A document which specifies in chronological order the dates by which the various tasks in the planning process should be accomplished.
Planning Cycle	A planning process repeated at regular intervals.
Planning Process	A regularized procedure for planning involving multiple steps.
Program Information	Information concerning the curriculum and the individual courses within it used in planning.
SCC	Small College Consortium, a group of schools, now fifty-four in number, which participate in the Institutional Development Project.
Student Information	Information about students used in the planning process, including such things as climate studies.
TAA	Technical Assistance Area. The term referring to one of the major subdivisions of the Institutional Development Project. It contains four technical assistance areas: Technical Assistance Area I: Planning, Management Information Systems, and Fiscal Management; Technical Assistance Area II: Institutional Development; Technical

TAA (continued)	Assistance Area III: Program Development; and Technical Assistance Area IV: Personnel Development.
TAA Director	One of the members of the central staff of the Small College Consortium who serves as the resident expert in a technical assistance area. Senior central staff members fill dual roles as TAA Directors and College Advisors.
Title III	A section of the Higher Education Act of 1965 which provides authorization for federal funding of consortia composed of colleges and universities.
Track I	One of three major categories in Professor Roger G. Schroeder's approach to planning, it is a definition of the planning process -- a delineation of responsibilities, interfaces, and deadlines.
Track II	The second major category in Professor Schroeder's approach to planning, it is concerned with developing plans for the college and its units, i.e. the format of the plans and their actual writing.
Track III	The third major category in Professor Schroeder's approach to planning, it involves the specification of information needed in planning and the collection of that information.
Unit	An office, department, discipline, or committee within the college.
Unit Plan	A plan for a one- or five-year interval written by an office, department, or discipline.

Appendix II

FOUR-YEAR GROWTH PLAN

Silver Lake College

Year I: Review of 1976-77

Area(s) of Emphasis:
Technical Assistance Area I: Planning
Technical Assistance Area II: Attrition/Retention
Technical Assistance Area III: Curriculum Development

Objectives:
1. To develop an all-campus planning model adapted to the needs of the college;
2. To survey extent college records;
3. To provide the faculty with information about the attrition problem in order to assist in the development of a consensus on campus both about the nature of the problem and possible solutions;
4. To develop a method of curriculum evaluation and integrate it into the all-campus planning cycle.

Accomplishments:
Silver Lake College achieved objectives one, two, and four. The OCC provided information about the attrition/retention problem, although this information pertained to national rather than local trends. Certainly there now exists on campus a broad awareness of the problem, but not consensus on remedies has yet developed.

Shortcomings:
1. The OCC began writing the Planning Procedures Manual too late in the year; consequently, the CCCP could not critique it in depth at an early period.
2. The OCC has not successfully integrated TA Area II and TA Area III activities into the planning calendar to the extent that he hopes to do.
3. The OCC, because of the pressure of other business, has not yet published the College Records Survey.
4. The OCC needs to analyze existing information about the attrition problem on campus and develop more information where needed.

Year II: 1977-78

Area(s) of Emphasis:
Technical Assistance Area I: Planning--major
MIS--minor
Technical Assistance Area II: Attrition/Retention--major
Admissions and Development--minor

Technical Assistance Area III: Curriculum Evaluation--major
Student Development--minor
Technical Assistance Area IV: Administrative Development--warm up
Faculty Development--warm up

Reasons(s) why these areas are perceived as needing attention:

1. The administration and faculty perceive planning as the one mechanism by which to achieve long term, lasting institution-wide changes.
2. Silver Lake College like most other colleges and universities in the United States has a retention problem, one which both the administration and the faculty feel uneasy about but about which no consensus exists on campus regarding solutions.
3. The curriculum at Silver Lake College has always possessed continuity and sequence but not always integration across inter-departmental lines. The college community perceives the need for a systematic, comprehensive evaluation of the existing curriculum prior to any attempts for major revisions.

Objectives:

1. To pilot the all-campus planning model developed during the 1976-77 academic year and to begin work on a college fact book.
2. To complete phases one and two of the Ostdick curriculum evaluation model.
3. To establish an ad hoc committee to examine the feasibility of adding a business major.
4. To give responsibility for coordinating retention/attrition efforts to a faculty member and to develop the capacity on campus to monitor those efforts.

Year III: 1978-79

Anticipated Area(s) of Emphasis:

Technical Assistance Area I: Planning--major
MIS--minor
Financial Management--major
Technical Assistance Area II: Attrition/Retention--major
Admissions--minor
Financial Aid--minor
Development--major
Technical Assistance Area III: Curriculum Development--major
Student Development--minor
Technical Assistance Area IV: Administrative Development--minor
Faculty Development--minor

Reason(s) why these areas are perceived as needing attention:

1. The rationales for planning, curriculum evaluation, attrition/retention are the same as presented in Year II.
2. The college has just established a separate development office even though there have been fund raising efforts prior to this

date in fund raising. The President's Assistant in Development, Douglas Mrotek, joined the administration during the 1977-78 academic year, and is learning procedures on campus.

3. The chief administrators at Silver Lake College perceive a need for improving the college's fiscal management techniques.

Objectives:

1. To expand the all-campus planning effort to include all collegiate units.
2. To complete phases three and four of the Ostdick planning model.
3. To review and evaluate the retention/attrition strategies developed during 1977-78 and to make any necessary adjustments.
4. To develop sophisticated fiscal management capabilities with primary emphasis during the 1978-79 academic year on information gathering and the selection of a strategy of implementation.
5. To evaluate the status of the Silver Lake College development effort and to implement changes which would increase its efficiency.

Year IV: 1979-80

Anticipated Area(s) of Emphasis:

Technical Assistance Area I:	Planning--major
	MIS--major
	Financial Management--major
Technical Assistance Area II:	Attrition/Retention--major
	Admissions--major
	Financial Aid--major
	Development--major
Technical Assistance Area III:	Curriculum Development--major
	Student Development--major
Technical Assistance Area IV:	Faculty Development--major
	Administrative Development--major

Reason(s) why these areas are perceived as needing attention:

1. The rationales for planning, curriculum evaluation, attrition/retention are the same as presented in Year II.
2. The rationales for development and fiscal management are the same as presented in Year III.
3. Title III funding obtained through the Tri-College Consortium has permitted an upgrading of admissions brochures and the use of consultants to advise admission personnel. The role envisioned for the SCC in this effort consists of providing another point of view which will permit further "fine tuning" of the admissions effort.
4. The Financial Aids Office is highly regarded on campus both for its efficiency and for the director's knowledge of her field. Efforts in this area will also consist of "fine tuning."
5. The administration perceives student development as one method of increasing the attractiveness of the school to potential students and of increasing the rate of retention.

6. Silver Lake College has worked in the area of faculty development in the past and the area continues to receive considerable emphasis in Tri-College Consortium activities. However, there exists a consensus among faculty and administrators that more needs to be done.
7. Silver Lake College has participated in administrative development programs during the past few years both on its own initiative and through the Tri-College Consortium. The SCC is perceived as a vehicle for pulling these desparate strands together.

Objectives:

1. To evaluate the strengths and weaknesses of the Silver Lake College planning cycle after one year of full scale operation.
2. To evaluate the Ostdick model of curriculum evaluation after one cycle.
3. To implement any necessary changes in fiscal management procedures which were identified during the previous academic year.
4. To continue the retention strategies implemented during the previous years making whatever adjustments that the administration and faculty deem necessary.
5. To obtain an outside evaluation of admission procedures which will permit further "fine tuning" of the process.
6. To permit the Financial Aids Officer to attend workshops, conferences, and seminars which will permit her to anticipate federal and state information requirements.
7. To implement the development strategies devised during the previous year and to make whatever adjustments appear warranted by experience.
8. To explore the student development field and devise appropriate strategies to assist efforts in retention and admissions.
9. To integrate efforts in faculty development with efforts in curriculum evaluation.
10. To gain consensus on a strategy of administrative development which will integrate previous efforts into one comprehensive approach.

Figure VI

SMALL COLLEGE CONSORTIUM FOUR-YEAR PLAN

Technical Assistance Areas	1976-77	1977-78	1978-79	1979-80
I				
Planning				
Planning Cycle	x	x	x	x
Research		x	x	x
Evaluation			x	x
MIS				x
Fiscal Management			x	x
II				
Enrollment Development				
Admissions				x
Financial Aid				x
Retention/Attrition		x	x	x
Fiscal Resources - fund raising (development)			x	x
III				
Program Development				
Curriculum Evaluation and Development	x	x	x	x
Student Development				x
IV				
Faculty Development and Evaluation				x
Administrative Development and Evaluation				x

x Major area of emphasis

Bibliography

The contents of this bibliography are somewhat idiosyncratic and require an explanation for the reader. It attempts to encompass all the materials available on the Silver Lake College campus written since 1974 to answer the technical question of how do institutions of higher education plan? It in no sense provides a survey of the subject since 1974; the college does not subscribe to many journals which publish articles in the field, for example Higher Education, and, of course, the school does not own every book in the field, although its participation in the Institutional Development Project of the Small College Consortium allowed a substantial increase in its collection during the 1976-77 academic year. Four books included on this list, Henderson, Miller and Radner, Temkin et al., and Adkins, are on order, but the library has not received them. Important articles and books written prior to 1974 are also included.

While the procedural aspects of planning thus receive primary attention, the list also encompasses other considerations in planning, for example societal change which may affect collegiate planning, the current status of American higher education, institutional goals, information needed in planning and the techniques required to produce it, the implementation of plans, resistence to innovations, etc. These are very broad topics. A comprehensive bibliography devoted to institutional goals would certainly want to include the classic formulations of the philosophy of education by Whitehead and Dewey, to name only two prominent authors, and would certainly overwhelm this list. The same comment holds true for most of the other topics. In this circumstance I have included recent essays and in a few

instances books on these subjects which I hope might serve as an introduction to the interested reader. If an inordinate number of papers dealing with the philosophy of education appear in Relating Education and Work, the explanation is that I attended the 1977 American Association of Higher Education Convention and heard the papers presented. My criteria of selection was the quality of the presentation rather than my agreement with the contents. As my wife can attest I spent the entire one-hundred-and-sixty mile drive back from Chicago disagreeing with one of the papers included in the bibliography. In this sense the list that follows is very idiosyncratic indeed.

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